

Meeting Techniques Resource Guide

Head Start Information & Publication Center

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March 2002

Prepared for the Head Start Bureau by Trans-Management System, Corp. under contract 213-00-0006. No official endorsement of any practice, publication or individual by the Department of Health and Human Services or the Administration for Children and Families, the Head Start Bureau or the Head Start Information and Publication Center is intended or is to be inferred.

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INTRODUCTION

Successful meeting techniques encompass both meeting planning and running effective meetings. Meeting planning includes the basics of meeting management, such as site selection, agenda planning, materials development, and peripheral considerations such as day care arrangements and refreshments. Effective meeting strategies are techniques used in running a successful meeting, such as facilitator roles, and methods incorporated for interactive group participation.

The purpose of this Resource Guide is to acquaint the user with meeting planning and effective meeting strategies that can be utilized in a variety of meeting environments, from staff, policy council or parent meetings, to planning an event or conference.

The Resource Guide contains selected resources on meeting planning and meeting strategies. Included in this guide are selected journal articles; books, associations and organizations that specialize in meeting planning; and selected Internet sites that may provide the user with additional information and resources.

This Resource Guide was not intended to be a comprehensive directory. Sources used in compiling the information in the guide were primarily from business databases. For currency of data, all citations are from the period 1992 to 2002.

ARTICLES

A selection of journal articles on the topics of meeting planning, which includes the basics of planning a meeting, such as site selection, refreshments, and agenda planning; and meeting strategies and techniques, which includes information on running effective meetings.

Meeting Planning

“Adventures in Meeting Planning.” **Meetings and Conventions** vol. 33 (1 March 1998): 33.

This article discusses the importance of meeting planners being prepared to react to medical emergencies.

Barkan, Terrance. “Streamlining Board and Committee Meetings: A Guide to Planning and Executing Meetings That Stay Focused on Strategic Issues.” **Association Management** vol. 54, no. 1 (January 2002): 101.

Stresses the importance of planning and preparation in order to ensure that board and committee meetings function smoothly. Addresses agenda setting, choice of location, scheduling, and the selection of meeting participants.

“Checklist.” **Successful Meetings** vol.46 (1 May 1997): 74.

A brief article that gives an overview of food and beverage planning for meetings.

Cioffi, Lori. “An Ounce of Prevention.” **Meetings and Conventions** vol. 28 (November 1993): 9.

Considers crisis management as it relates to meetings, as well as problem-solving techniques, including having a written plan, the assignment of priorities and the ability to discern when a crisis is imminent.

“Conference Planning Guide.” **Training and Development** vol. 51 (1 July 1997): 42.

This guide includes tips on negotiating better deals, making meetings more environmentally sound, and accommodating attendees with disabilities.

Dendinger, Martha Jo. “Determining A Meeting’s Objectives.” **Meetings & Conventions** vol. 35, no. 9 (August 2000): 32.

Emphasizes the importance of articulating the purpose and objectives of a meeting prior to planning the meeting. Suggests that there are two types of objectives: process objectives and outcome objectives. Process objectives pertain to the way a meeting should unfold while outcome objectives concern what the meeting should accomplish.

Eisenstodt, Joan and Richelle Shafer. “A Meeting Planner’s Primer.” **Los Angeles Business Journal** vol. 15 (20 September 1993): S10.

A basic guide to meeting planning, this article includes information on setting up a meeting room, refreshments, speakers, and other details.

Goldman-Edry, Sharon. "The Murphy's Law of Meetings." **Crain's New York Business** vol. 13 (14 April 1997): 28.

The best way to insure a well-planned meeting is to have good on-site communications, advance planning and the ability to cope with last-minute problems.

Hawkins, Charlie. "First Aid for Meetings." **Public Relations Quarterly** vol. 42 (Fall 1997): 33.

Discusses fundamental principles and techniques of meeting planning, such as agenda planning, establishing a clear purpose, and designating a facilitator.

Leach, Laura. "A Planning Primer for Small Associations." **Association Management** vol. 46 (1 April 1994): 83.

Regardless of the size of an organization's staff, or limitations on resources, planning a successful meeting is possible by staying organized, tapping volunteers, and advanced planning.

"Let the Meetings Begin." **Canadian Business** vol. 65 (November 1992): 93.

Meeting planning logistics are discussed, including financing, choice of venue, and speaker.

Lynn, Jacquelyn. "Managing Meetings." **Commercial Law Bulletin** vol. 16, no. 6 (November/December 2001): 12-13.

Discusses the basic elements of meeting planning, such as agenda setting and site selection. Also stresses the importance of post-meeting evaluations.

"Picking Up the Pieces." **Meetings and Conventions** vol. 29 (1 May 1994): 39.

Offers suggestions for coping with meeting planning when assuming responsibility for planning an event mid-stream.

"Pre-Meeting Planning." **Successful Meeting** vol. 45 (1 October 1996): 87.

This is a comprehensive guide to writing contracts for meetings and events.

Quint, Barbara. "A Lean, Mean Conference Machine." **Information Today** vol. 18, no. 7 (July/August 2001): 8-12.

Highlights the advantages of teleconferencing.

Sampson, Scott E. "The Use of Decision Technology in Conference Planning." **Decision Line** vol. 32, no. 3 (May 2001): 31-32.

Stresses the value of e-mail and other technologies to the conference planning process.

Torbenson, Eric. "Not-So-Secret Agenda." **CIO** vol. 11 (1 December 1997): 32.

Provides tips for successful meeting planning, including what time of day to schedule a meeting, and how to create effective handouts.

Watson, Susan C. "Managing Meetings the Small Association Way." **Association Management** vol. 44 (1 April 1992): 101.

Relates how a small association planned its first convention with only three staff members, no meeting planning experience, and a limited budget.

Meeting Strategies and Techniques

“Back to Basics.” ***Meetings and Conventions*** vol. 33 (1 March 1998): 32.

Discusses the essentials of running an effective board meeting.

Carey, Robert. “C’mon, Everybody’s Doing It.” ***Successful Meetings*** vol. 47 (October 1997): 42.

Meeting planners should consider adopting a “free-thinking approach” that entails use of creativity and unconventional methods, such as role-playing, relaxation techniques, and music.

Brotherton, Phaedra. “Mind Your Manners.” ***Black Enterprise*** vol. 29 (June 1999): 84.

How a person comes across in a meeting may influence their personal success. Be conscious of personal habits that may distract from the meeting. Convey a positive outlook.

Falcone, Paul. “Reinventing the Staff Meeting.” ***HR Magazine*** vol. 45, no. 8 (August 2000): 143-146.

Argues that regular staff meetings improve communication and engender a sense of camaraderie. Regular staff meetings provide a forum for recognizing employees and examining ways that the organization could have handled a challenging situation in a better way.

Finnigan, Jerome. “Is This Meeting Necessary? Ten Questions to Make Meetings More Productive.” ***Supervision*** vol. 62, no. 11 (Nov. 2001): 6-8.

Provides a ten-point checklist to help managers plan and conduct their meetings more effectively.

Hayhoe, George F. “Communicating Across the Country or Across Town: Planning and Producing Effective Teleconference Meetings.” ***Technical Communication*** vol. 40 (February 1993): 160.

Teleconferencing allows individuals to work together to accomplish a common goal, despite geographic barriers. Varieties of teleconferencing, planning, and production issues are discussed.

“Hazardous Material.” ***Successful Meetings*** vol. 47 (1 March 1998): 42.

Offers tips on how to plan for meetings that have sensitive topics such as diversity, ethics, and sexual harassment, and how thorough planning makes the difference between success and failure.

Hoxmeier, John A. and Kenneth A. Kozar. “Electronic Meetings and Subsequent Meeting Behaviour: Systems as Agents of Change.” ***Journal of Applied Management Studies*** vol. 9, no. 2 (December 2000): 177.

Describes an empirical study that compared meetings which employed group support systems to improve effectiveness to meetings that utilized traditional elements. Suggests that

meetings which incorporate technological improvements may result in more satisfactory impressions of meeting efficacy.

Hurt, Floyd. "Taking the Lead." **Successful Meetings** vol. 46 (December 1997): 56.

Checklist for organizing and facilitating a group session, including problem-solving techniques, stating clear objectives, and member participation are examined.

"Is This Meeting Really Necessary?" **USA Today** vol. 126 (8 January 2001): 2668.

Notes the growth of formal meetings in response to increased interdepartmental activity. Suggests considering the meeting's objective when selecting participants. Stresses the importance of distributing an agenda prior to the meeting and taking notes to summarize the actions taken during the meeting.

Kaeter, Margaret. "Facilitators More Than Meeting Leaders." **Training** vol. 32, no. 7 (July 1995): 60-64.

Describes the different roles that meeting facilitators can play. Argues that facilitators need specialized training in order to adequately fulfill their roles.

Kaydo, Chad. "Unforgettable Meetings." **Sales & Marketing Management** (February 1998): 71.

Effective meeting strategies are discussed, including developing a sense of camaraderie, and organizing special events around the meeting.

Ledgerwood, Philip C. "Not Another Meeting!" **Principal** vol. 76 (1 November 1996): 42.

The keys to successful meetings are planning, creativity, and shared responsibilities.

McManus, Kevin. "Overcoming Meeting Madness." **IIE Solutions** vol. 33, no. 5 (May 2001): 20.

Provides a brief overview of the basic elements of meeting management. Suggests two ideas that can improve meetings: videotape and a meeting map. Meeting maps can be used to track the flow of discussions, while videotapes provide the opportunity to evaluate how well meetings progressed.

Pattison, Sherry A. "Staff Meetings: An Opportunity for Accelerated Training of Employees." **Journal of Workplace Learning** vol. 13, no. 4 (2001): 172-178.

Describes the use of various accelerated learning techniques, such as experiential games and whole-brain strategies.

Rudman, Carol. "Meetings Matter." **Take-Charge Assistant** vol. 2 (February 1996): 3.

Examines strategies for successful participation in meetings, including recognition of presence, and appreciation of contribution.

Vasallo, Philip. "Meeting of the Minutes: Writing Meeting Minutes." **Etc** vol. 58, no. 2 (Summer 2001): 219-225.

Describes some of the issues that make it difficult to draft accurate meeting minutes. Suggests several ideas to improve the quality of meeting minutes, such as staying focused, asking questions and limiting one's own participation in the meeting.

BOOKS AND JOURNALS

A selection of books and journals on the topics of meeting planning, and effective meeting strategies.

Books on Meeting Planning

Allen, Judy. ***Event Planning: The Ultimate Guide to Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, and Other SP***. John Wiley & Sons, 2000.

Presents a detailed plan for successfully administering meetings and special events. Provides practical guidance on meeting organization and management, including selecting a venue, budgets, scheduling, media, staffing, and cost-saving measures.

Boehme, Ann J. ***Planning Successful Meetings and Events***. AMACOM, 1998.

Covers meeting planning basics such as site selection, negotiating contracts with vendors, budgeting, promotional activities and exhibits. Registration procedures and budgeting are also among the topics that this book deals with.

Campion, Darcy and Devney Campion. ***Organizing Special Events and Conferences: A Practical Guide for Busy Volunteers and Staff***. Pineapple Press, Inc., 2001.

This book has ideas and suggestions appropriate for all kinds of meetings, from local social activities to national conferences. Appropriate for volunteer organizers as well as professional planners, includes schedules, lists of resources and anecdotes from professional and volunteer meeting planners.

Carver, John. ***Planning Better Board Meetings: CarverGuide 5, vol. 5***. Jossey-Bass, Inc., 1996.

Discusses how to streamline board meetings by focusing the board's attention on agenda items. Offers strategies for controlling discussions and selecting meeting topics. Discusses the proper length of board meetings.

Craven, Robin E., Lynn Johnson Golabowski. ***The Complete Idiot's Guide to Meeting and Event Planning***. Macmillan Publishing, 2001.

Addresses basic meeting planning functions, such as budgeting for a meeting, catering a meeting, negotiating meeting space and planning activities. Also covers transportation, food service and registration procedures.

Dickey, Fern. ***Last Minute Meetings***. Career Press, Inc., 2000.

Provides current resources for planning meetings on short notice. Selecting meeting space, negotiating with vendors, agenda setting and selecting speakers are other topics covered in this book.

Haynes, Marion E. ***Effective Meeting Skills: A Practical Guide for More Productive Meetings***. Crisp Publications, 1997.

Describes the different types of meetings and discusses how to decide whether a meeting is needed. Provides ideas for handling conflict that can arise during meetings and offers suggestions on how to improve meetings. Also notes the importance of evaluation and feedback.

Levasseur, Robert E. ***Breakthrough Business Meetings: Shared Leadership in Action***. iUniverse, Inc., 2000.

Offers techniques for focusing meetings to make them more efficient and beneficial.

Lippincott, Sharon. ***Meetings: Do's, Don'ts and Donuts: The Complete Handbook for Successful Meetings***. Lighthouse Point Press, 1994.

Identifies problems associated with meeting planning, and offers solutions that can be implemented.

Maitland, Iain. ***How to Organize a Conference***. Ashgate Publishing, Ltd., 1996.

Site selection, budgeting, setting objectives and scheduling are among the topics covered in this book. Other chapters are devoted to hiring speakers and publicizing conferences. Includes a checklist and a list of references.

Mosvick, Roger K. and Robert B. Nelson. ***We've Got to Start Meeting Like This!: A Guide to Successful Meeting Management***. JIST Works, Inc., 1996.

Illustrates ways to shorten meetings while still improving them. Considers how and why attitudes toward meetings have changed over time. Suggests various meeting formats to improve the quality of a group's decisions.

Mundry, Susan, Senta Raizen, Susan Loucks-Horsley and Edward Britton. ***Designing Successful Meetings and Conferences in Education: Planning, Implementing, and Evaluating***. Corwin Press, International, 2000.

Identifying a conference's intended audience, choosing speakers, budgeting and handling design questions, are some of the basic meeting planning issues discussed in this book. Other sections of the book focus on how to evaluate meetings and how to develop conference proceedings.

Newstrom, John W. and Edward Scannell. ***The Big Book of Business Games: Icebreakers, Creativity Exercises and Meeting Energizers***. McGraw-Hill Professional, 1995.

Describes games and activities that can be used to enliven staff meetings or presentations and build staff cohesiveness. Also includes team-building exercises.

Newton, Christine. ***Marvellous Meetings: A Toolkit for Facilitators and Team Leaders***. Gower, 2001.

Provides ideas for creating checklists, questionnaires, discussion cards and other resources that can be used to improve the fundamental aspects of meeting planning and management. These aids can be used to provide meeting feedback, conduct a meeting audit, or simply improve meeting documentation.

Smith, Taggart E. **Meeting Management**. Prentice Hall PTR, 2000.

Provides an overview of how to conduct three types of meetings: information-giving, interactive and problem-solving. Includes advice on how to conduct meetings, how to handle interruptions, how to use visual aids, how to manage an agenda, and other topics.

Timm, Paul R. **How to Hold Successful Meetings: 30 Action Tips for Managing Effective Meetings**. Career Press, 1997.

This guide to successful meeting planning includes information on agenda planning as well as reinvigorating a stalled meeting.

Books on Meeting Strategies and Techniques

3M Meeting Management Team. **Mastering Meetings: Discovering the Hidden Potential of Effective Business Meetings**. McGraw-Hill Companies, 1994.

Provides guidance on such basic questions as whether a meeting is necessary, who should attend and where the meeting should be held. Also suggests tips for incorporating multimedia tools to enliven meetings and ideas for improving presentations.

Burns, Robert. **Making Meetings Happen: A Simple and Effective Guide to Planning, Conducting and Participating in a Successful Meeting**. Business and Professional Publishing, 2001.

Suggests ways to determine if a meeting is really necessary, and if so, who should attend. Covers various aspects of conducting a meeting, such as developing the agenda, leading meetings, handling conflict, and meeting follow-up.

Chang, Richard Y. and Kevin Kehoe. **Meetings That Work!: A Practical Guide to Shorter and More Productive Meetings (Quality Improvement)**. Chang Assoc., 1994.

Gives practical examples and methods that can be applied on the job to make meetings more effective and productive.

DeVries, Mary A. **How to Run a Meeting**. Plume, 1994.

This guide to parliamentary procedure contains the essentials of conducting a meeting in simple language. Includes tables, lists, and samples of dialogue.

Doyle, Michael and David Strauss. **How To Make Meetings Work**. Berkley Pub. Group, 1993.

Discusses the Interactive Method of conducting meetings, which the author claims has been shown to increase productivity by 15 percent.

Frank, Milo O. **How to Run a Successful Meeting in Half the Time**. Washout Pub. Co., 1995.

The author demonstrates how to put an end to unproductive meetings.

Hawkins, Charlie. **First Aid for Meetings: Quick Fixes and Major Repairs for Running Effective Meetings**. Career Research Institute, 1997.

Offers advice, solutions and common-sense tips to improve planning and effectiveness of company meetings regardless of the subject or objective.

Haynes, Marion. ***Effective Meeting Skills***. Crisp Publications, 1997.

Examines the difference between an informational and a decision-making meeting, as well as solutions to common meeting problems, and resolving conflicts constructively.

Howell, Johnna L. ***Tools for Facilitating Team Meetings***. Integrity Pub., 1995.

This guide for facilitating team meetings is written for both beginners and advanced organizers. Included are sections on agenda writing, setting meeting rules, and evaluating meetings.

Hunter, Dale. ***The Art of Facilitation: How to Create Group Synergy***. Fisher Books, 1995.

This training resource enables group members to understand facilitation and take on this role themselves.

Kaner, Sam. ***Facilitator's Guide to Participatory Decision-Making***. New Society Pub., 1996.

A comprehensive guide to facilitating meetings, includes information on agenda design, discussion techniques, and group process skills.

Kaye, Steve. ***Meeting in an Hour or Less***. Personal Quality, 1997.

Easy, practical techniques that can improve the effectiveness of meetings are discussed.

Levasseur, Robert. ***Breakthrough Business Meetings: Shared Leadership in Action***. Adams Pub., 1994.

This guide introduces a series of innovative techniques for managing meetings and keeping them focused.

Marshall, Jeannie. ***Energetic Meetings: Enhancing Personal & Group Energy & Handling Difficult Behavior***. Jemel Pub House, 1994.

This user-friendly guide is designed for every type of meeting, including staff meetings, management meetings, committee meetings, and training programs. Provides step-by-step guidance for creating a positive meeting environment.

Miller, Robert F. and Marilyn Pincus. ***Running a Meeting That Works***. Barron Educational Series, 1997.

Guidelines for business professionals to run meetings effectively.

Nelson, Robert B. ***Better Business Meetings***. Irwin Professional Pub., 1994.

Effective techniques for obtaining high-quality decisions in a timely manner in a group or team meeting. Includes checklists, forms, and examples to assist readers.

Newstrom, John and Edward Scannell. ***The Big Book of Business Games: Icebreakers, Creativity Exercises and Meeting Energizers***. McGraw-Hill, 1996.

Discusses business games and activities used as productivity tools.

Roberts, Henry M. and Laurie E. ***21st Century Robert's Rules of Order***. Dell Pub., 1995.

A user-friendly update on parliamentary procedure speaks in everyday business language. This version includes descriptions of various types of meetings and the specific duties of elected officers.

Schwarz, Roger M. ***The Skilled Facilitator: Practical Wisdom for Developing Effective Groups***. Jossey-Bass, 1994.

This book demonstrates how a facilitator can make a group more effective by identifying patterns of behavior that are obstacles to successful group meetings.

The following journals feature articles on meeting planning, as well as meeting strategies and techniques.

Association Meetings. Maynard, Massachusetts. Dean Laux.

Meeting News. Pittsfield, Massachusetts. Miller Freeman Publications.

Meeting Manager. Middletown, Ohio. The Planners.

Meetings and Conventions. New York, New York. Purdis Group Publications.

Successful Meetings. Philadelphia, Pennsylvania. Bill Communications.

ASSOCIATIONS AND ORGANIZATIONS

The following is a selection of organizations and associations that provide information and resources on meeting planning.

Association of International Meeting Planners (AIMP)

2547 Monroe St., Dearborn, MI 48124-3013 USA

Telephone: (313) 563-0360

Fax: (313) 563-1448

Publications: Newsletter, monthly.

Conventions/meetings: bimonthly board meeting.

Trade and professional associations organized for the exchange of information on meeting locations. Negotiates meetings and incentive travel.

Association of Meeting Professionals (AMP)

2025 M Street, NW, Washington, DC 20036

Telephone: (202) 973-8686

Fax: (202) 973-8722

Internet: <http://www.ampsweb.org>

E-mail: AMPS@courtesyassoc.com

Conventions/meetings: several meetings annually

A not-for-profit membership organization that serves the professional needs of meetings management professionals in Northern Virginia. Provides educational programs and networking activities.

International Society of Meeting Planners (ISMP)

8383 East Evans Road, Scottsdale, AZ 85260-3614 USA

Telephone: (602) 483-0000

Fax: (602) 998-8022

E-mail: ismp@iami.org

Internet: <http://www.iami.org/ismp.html>

Publications: *Directory of Designated Members*, annual (membership directory); *Global Connections*, quarterly (newsletter).

Conventions/meetings: annual congress.

An organization of meeting planners and related professionals. Works to improve professionalism and competency in the industry as well as create new business opportunities for members. Provides networking opportunities.

Meeting Professionals International (MPI)

4415 LBJ Freeway, Suite 1200, Dallas, Texas, 75244-5903

Telephone: (972) 702-3000

Fax: (972) 702-3070

E-mail: mr@mpiweb.org

Internet: <http://www.mpiweb.org/>

Publications: *The Meeting Professional* (journal); *Community Netnews* (on-line member newsletter)

Conventions/Meetings: National and international conferences

An international association of meeting planners that offers education programs, professional certification, conferences, publications and other resources for meeting professionals worldwide.

National Coalition of Black Meeting Planners (NCBMP)

Formerly: National Black Meeting Planners Coalition
8630 Fenton St., Ste. 126, Silver Spring, MD 20910 USA

Voice: (202) 628-3952

Fax: (301) 588-0011

Publications: Directory, annual (listing of all members, associates and meeting planners); quarterly newsletter.

Conventions/meetings: semiannual conference - always April and November.

Purposes are to act as liaison with hotels, airlines, convention centers, and bureaus in an effort to assess the impact of minorities in these fields; assess the needs of the convention industry and how best to meet these needs; enhance members' sophistication in planning meetings; maximize employment of minorities in the convention industry. Maintains speakers bureau. Conducts educational and research programs and compiles statistics on demographic employment of minorities in the convention industry. Maintains placement service.

Society of Corporate Meeting Professionals (SCMP)

Formerly: Society of Company Meeting Planners
1819 Peachtree St. NE, Ste. 620, Atlanta, GA 30309-3711 USA

Telephone: (404) 355-9932

Fax: (404) 351-3348

E-Mail: assnhq@atl.mindspring.com

Publications: SCMP Newsletter, quarterly (covers association and industry news; includes calendar of events).

Conventions/meetings: semiannual - always spring and November.

An organization of company and corporate meeting planners and conference center or hotel convention service managers united to promote continuing education and high standards among members. Maintains databank of past meeting site selections and related information. Sponsors educational meetings and lectures.

Society of Government Meeting Planners (SGMP)

219 E. Main St., Mechanicsburg, PA 17055 USA

Telephone: (717) 795-7467

Alternate Telephone: (717) 795-7553

Fax: (717) 795-7473

Publications: *Government Meeting Professional*, monthly (newsletter). Membership Directory, annual.

Conventions/meetings: Annual Education Conference and Tradeshow. (Education conference and tradeshow for supplier members to exhibit only).

An organization comprised of individuals involved in planning government meetings on a full- or part-time basis; suppliers of services to government planners. Provides education in basic and advanced areas of meeting planning and facilitates professional contact with other government planners and suppliers knowledgeable in government contracting. Maintains referral network of planning resources, information on latest techniques, and opportunities to inspect conference facilities.

INTERNET SITES

The following virtual sites provide information and resources on meeting and event planning, and cover topics such as site selection, food and beverage services, and advertising.

Event411

<http://www.event411.com/>

Provides information about registration, meeting management and housing services offered by this company.

The Meeting and Event Planning Center

<http://www.eventplanner.com>

Published by Interactive Marketing Technologies, this website provides information on event planning such as hotels, convention centers, travel, and related services, and links to many external sites on the Internet.

The Meeting Guide

<http://www.mmaweb.com/meetings>

Published by Meeting Forum, the Meeting Guide provides meeting planners with resources and connections necessary to plan meetings, conferences and events. Included on this site is information on organizations offering audio-visual services, professional meeting planning services, marketing, and destination management.

The Meeting Professionals Network

<http://www.mpnetwork.com/>

This site is an on-line marketplace where meeting professionals can access information about meetings industry vendors, suppliers, destinations and meeting properties.